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ABSTRACT

This report describes a program to expand the Books by Mail program at the Monterey (California) County Library. An introductory section provides background information on the development of the program, and the second section discusses the process of identifying target populations, which include those in geographically remote areas and the Correctional Training Facility (CTF) in Soledad. Strategies for publicizing the service are described in the third section. Three aspects of the Books by Mail service are detailed in the next section: (1) the collection, which includes popular trade and mass paperbacks as well as bestsellers leased through Baker and Taylor; (2) the catalog--a selection tool for subscribers--and its components; and (3) library procedures for service delivery. The two final sections briefly describe other activities of the Books by Mail program such as the newsletter, summer reading programs, and school visits. The appendixes, which constitute the major part of the report, contain a manual for CTF requests, and a tutorial for the Books by Mail program management system, which uses the PFS series of microcomputer software. (MES)

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BOOKS BY MAIL PROGRAM

AN IMPLEMENTATION HANDBOOK

BY
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SPECIAL SERVICES COORDINATOR

IR053361

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I. INTRODUCTION

A service, to be successful, has to address a need that has been clearly identified, and respond to a demand voiced by the potential users. It also needs to be creative in taking the product/service to the user in ways that overcome the barriers faced by traditional approaches.

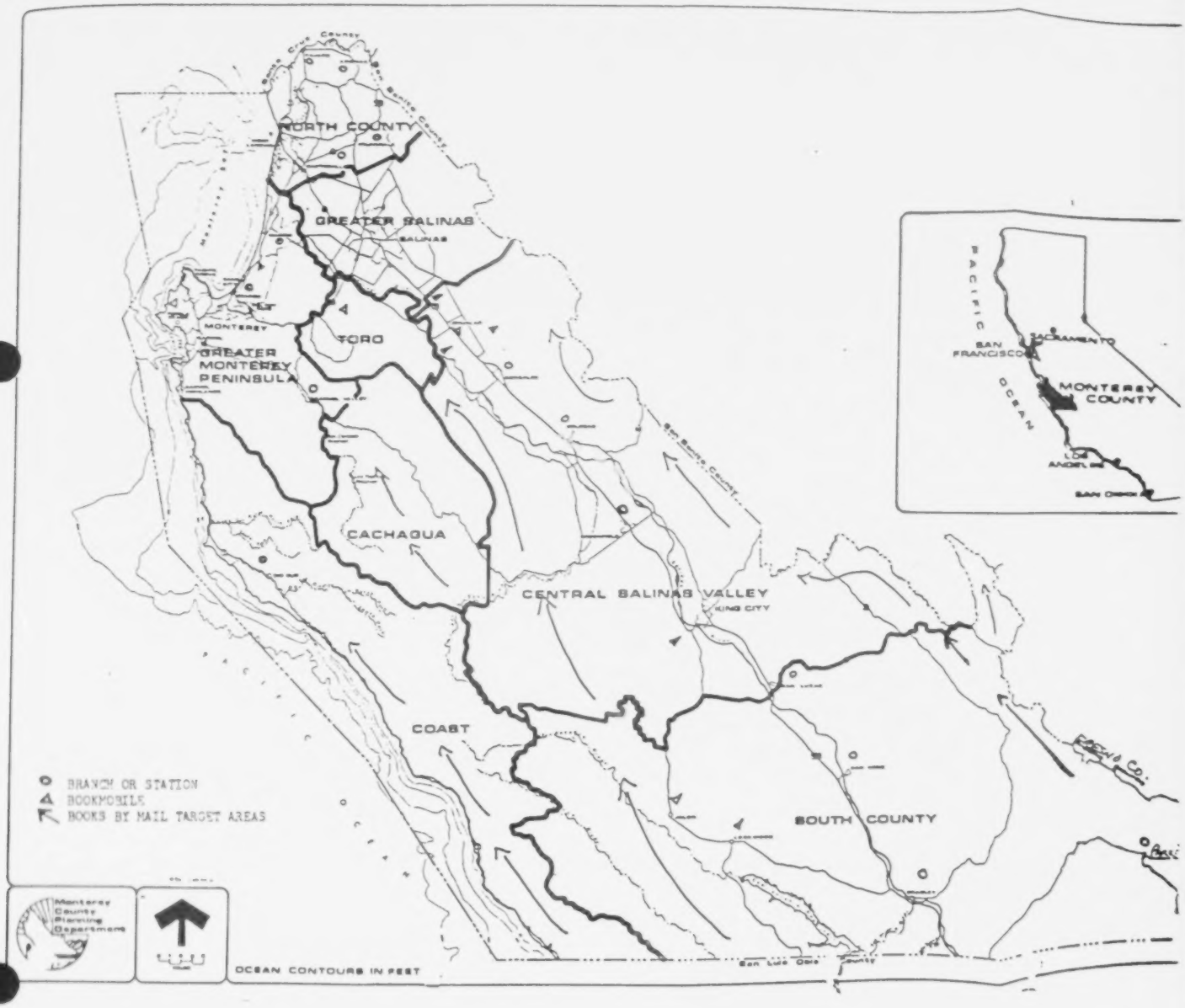
The Books by Mail Program of the Monterey County Library was developed initially as a temporary measure, in response to an emergency situation. In the winter of 1983-84, a massive landslide isolated hundreds of Monterey County coastal residents for months. The library was among the many services that the victims of the severe winter had to do without. It was during that period that a small group of Big Sur library users contacted the County Librarian to request library materials by mail, while the road reopened. Although no adequate mailing setup was available for such a service, the library administration agreed to mail specific titles requested by the coastal residents.

Also in 1984, we began offering interlibrary loan and reference services to the inmates of the Correctional Training Facility in Soledad, through our direct contact with two of the institutional librarians. The initial procedures were very informal and were not conducive to a well organized or effective service. The materials were physically picked-up and delivered by the institutional librarians, which was a burden on their already heavy workload. In addition, the inmates were primarily requesting materials to support their academic work and selecting them with the use of Subject Guide to Books in Print. This often resulted in extensive and expensive interlibrary loan searches for materials that were not always the adequate or useful. Furthermore, no selection tool was available for recreational reading or Spanish language materials.

For many years, we had offered home delivery services to homebound disabled persons, with the assistance of volunteers. This was a service fairly easy to coordinate in communities where volunteers abounded and where great geographic distances were not a factor. However, it was difficult, sometimes impossible, to respond to requests in rural areas or in communities without a tradition of volunteerism.

The Books by Mail program offered us a new approach to service, one that seemed to overcome some of the obstacles that we had faced when using traditional channels to serve a variety of non-traditional library clients. We decided then to explore other remote geographic areas where no library services where accessible, and to discuss with the administrators of CTF Soledad the possibility of extending Books by Mail to prison inmates.

The development of this program was made possible by a grant under the auspices of the Library Services and Construction Act, administered in California by the State Librarian. However, the opinions expressed herein do not necessarily reflect the position or policy of the U.S. Department of Education or the California State Library, and no official endorsement by the U.S. Department of Education or the California State Library should be inferred.



II. IDENTIFYING THE TARGET POPULATIONS

A. GEOGRAPHICALLY REMOTE AREAS

A mere glance at a County map that gives library locations and Bookmobile stops, made obvious the number of large geographic areas that were underserved, if served at all. However, to determine which would be our key target areas, we had to research the population characteristics and needs of each the focus geographic sectors. We had a clear picture of the needs of the communities in the south coast. We knew that once the road opened, many of them would return to their local branch. However, the branch is thirty miles south of the nearest library or Bookmobile stop, and there are forty miles of winding, dangerous road between the branch and the San Luis Obispo County line. Therefore, we suspected that possibly hundreds of people on the Coast, north and south of the Big Sur branch, had limited access to library services in the best of conditions.

Similarly, there were pockets of populations between all of our branches in the Salinas Valley, and especially in the area known as "South County", south of Greenfield and up to the San Luis Obispo County Line. Another extensive underserved area was the eastern region of the County.

To gather information about potential Books by Mail users, we analyzed statistical data provided by the County Planning Department. Census tract information was, for our needs, useless, since it is not specific enough in its coverage of sparsely populated areas. The census tract was often so large that it encompassed either an urban area or an incorporated town with its own library facility. More useful was the information supplied by enumeration district records. After a careful analysis, we concluded that approximately 9,000 County residents would qualify for the service. These were people who lived at considerable distances from their nearest library or Bookmobile stop, who were occasionally isolated because of poor roads or severe weather conditions, or who were served by a library with limited service hours. Also included were children who were served at their school by the bi-weekly Bookmobile stop, but who had no access to library services at home during the summer. No information was available as to an approximate number of homebound persons who would use the service.

After gathering statistical data, we decided to survey some of the potential users to determine the level of interest that existed in a service of this nature, and the level of support that we would get from within the target population in spreading the word, once the program was in place. The latter was of particular importance, since we suspected that traditional means of publicity would probably be inadequate in reaching this population.

Rather than attempting to mail hundreds of letters anonymously addressed to "Resident", we decided to target one or two individuals in each of the focus regions and to mail the letter directly to them. To identify them, we spoke to our staff in small rural branches, followed leads based on personal contacts, located small markets in the areas, and when all else failed, used the reverse telephone directory. We targeted seventeen individuals, and nine responded. All expressed great interest in the service and offered to help us publicize it among their neighbors. They also gave us information regarding how they find out about services and products, e.g., which newspapers are most popular, which radio stations reach them, where the nearest bulletin boards are, where people shop, etc.

B. CORRECTIONAL FACILITY (CTF - Soledad)

We were aware that all service plans needed the approval and support of the CTF administration. We began by meeting with the director of academic programs, who is also supervisor of libraries, and with the community resources manager. In preparation for our initial contact with the administration, we had several meetings with the institutional librarians, which helped us understand academic programs and library services to inmates, specific needs not being met by their libraries, and procedures and security matters in the facility.

The meetings with the administration resulted in the following agreements:

a. The institutional librarians would be our direct contacts within the facility.

b. We would consult with the mail sergeant to ensure that our mailings complied with the strict security regulations of the institution.

c. Three inmate clerk positions, one for each facility library, would be created to handle Books by Mail operations.

d. The institutional librarians would inform inmates of the service and encourage their use. The librarians would keep internal records of Books by Mail activities, ensure that the materials were returned, and develop the forms and procedures needed to manage the program in-house.

All materials were mailed to and from CTF during the first year. For the second year, however, the institution offered to send their courier to pick-up and deliver the shipments. This was established as the regular delivery system, which has reduced considerably our mailing costs.

Additional information regarding our service to the Soledad inmates is provided in Appendix A.

III. PUBLICIZING THE SERVICE

As described previously, our initial contact with rural residents was through the key individuals who were identified in each of the target communities, local businesses, personal contacts, schools, or the criss-cross directory. We contacted them by mail or phone to begin our "word of mouth" campaign.

Once the service was in place, we sent press releases to Monterey County newspapers. The Monterey Peninsula Herald and the Salinas Californian published excellent feature stories with photographs. However, these articles brought responses only from residents of urban areas who were not eligible for service under the guidelines of the program. Requests from urban homebound persons were referred to volunteer outreach programs at local libraries.

A more effective strategy has been the bulk-mailing of flyers announcing the publication of each edition of the catalog. With the assistance of the local post offices, we compiled a list of the postal carrier routes in our targeted areas, including the number of families in each route. Before the catalog is mailed, we call the post offices to verify the number of mail boxes in each area. A flyer is then mailed to each family. Since some rural routes extend into other nearby counties, we make sure that the flyer clearly indicates that only Monterey County residents are eligible for the service. The flyer includes a registration form, and should be mailed two months prior to the mailing of the catalog.

We reach an average of 1,460 homes in northern Monterey County and 1,800 in South County with each mailing, totalling 3,277 in September, 1987. The response is always excellent.

This project is funded under the Auspices of the Library Services and Construction Act.

MONTEREY COUNTY LIBRARY

BOOKS BY MAIL

MONTEREY COUNTY Library
FOUNDED IN 1912

COMING IN OCTOBER...
1987 FALL-WINTER CATALOG!

★ BEST SELLERS ★ POPULAR PAPERBACKS ★ LARGE PRINT
★ CHILDREN'S & YOUNG ADULT BOOKS ★ REFERENCE SERVICE
★ BOOKS IN SPANISH (LIBROS EN ESPAÑOL).

A Free Service for Rural and Homebound Residents of Monterey County.

Please return this portion of the form to register for Books by Mail.

NAME _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

PHONE _____

For more information call: BOOKS BY MAIL (408) 424-3244

Mail this form to:
BOOKS BY MAIL
MONTEREY
COUNTY LIBRARY,
26 CENTRAL AVE,
SALINAS, CA.,
93901

IV. THE BOOKS BY MAIL SERVICE

The Books by Mail program attempts to extend a full range of library services to its subscribers. Therefore, in addition to offering a popular paperback collection, we encourage users to submit author/ title requests, and subject and reference questions. Materials that are not available in the County Library collection, are borrowed from other libraries. The service is completely free. The return postage is also provided.

A. The Books by Mail Collection

The collection consists mostly of popular trade and mass paperbacks for children, adults, and young adults, in English, Spanish, and large print. Best sellers, however, are hardbacks ordered from Baker and Taylor through a lease plan.

a. B & T Lease Plan - Books by Mail has a half membership---i.e. 5 titles a month. We find that this is sufficient to meet the demand. You are not required to order exactly five titles each month. In some months, more than 5 titles are ordered, and in others fewer, depending on the selection. It is advisable to keep an open credit for one or two titles, so that you may be able to order additional copies of those extremely popular books. The plan allows you to have up to fifty volumes at a time. Once you reach the limit, you must return some. Because of the high cost of mailing hardbacks, we purchase a paperback copy of the best seller as soon as it is published. If the demand for the title has decreased, we then return the hardback to B & T.

To return books to Baker & Taylor, indicate the number of copies of each title being returned on the inventory sheet that B&T mails to you every month. Place the inventory sheet in the box with the books being returned. Return them using the label provided by Baker & Taylor.

Our lease plan is renewed every January.

b. Paperback Orders:

As mentioned previously, the collection is a basic, popular one. However, it has grown to reflect the interests of our diverse service group. For instance, South Coast users seem very interested in Eastern religions, mysticism, nature, photography, and Californiana. The rest of the county seems more interested in best sellers, "how-to" materials, crime stories, and popular fiction. Among young adults, the series romances such as Sweet Valley High and Seniors, are especially popular. In the Children's collection, picture books and easy readers are favorites, as well as educational materials that serve the needs of the families that teach their children at home.

Monthly, the books are ordered from Ingram's ADVANCE and PAPERBACK ADVANCE. ADVANCE covers trade paperbacks and children's titles. PAPERBACK ADVANCE covers mass market paperbacks and young adult.

In addition to the Ingram catalogs, we consult other review sources, publishers' catalogs, or visit bookstores. For the "not so popular" materials, we have found that the offerings of Shambhala publications, University of California, E-Z Nature, etc., are particularly interesting. If possible, we select titles from these catalogs but order through Ingram, to take advantage of the 40% discount.

Large print books were originally ordered from G.K. Hall and John Curley. During the third year, we subscribed to the standing order plan for mysteries, westerns, and romances offered by Ulverscroft. To supplement the selection, we mail lists of other large print books available in the County Library collection to our large print readers, and include those lists in our bimonthly newsletter.

Spanish language books are ordered from Baker & Taylor, Fiesta Publications, Hispanic Book Distributor, or are bought at bookstores in San Francisco. The most popular titles in Spanish among both inmates and rural users are American best sellers translated into Spanish, the occult, "strange but true" stories, self-improvement (from popular psychology, to writing letters, vocational training, resumes, job interviews, etc.), scandals in the Mexican government, true crimes, popular music, poetry, learning English, and materials about Latin American countries and culture.

We purchased two copies of each title for the first catalog. Experience showed, however, that it was best to purchase single copies, with the exception of certain best-selling authors and popular subjects. This decision to eliminate unnecessary duplication permitted us to increase the number of individual titles in the collection. When a title is extremely popular, we immediately purchase or lease a second or third copy from either Ingram or Baker & Taylor. If we often need to request a particular title in interlibrary loan, we usually add it to the collection.

c. Processing the Collection:

As the books are received, it is recommended that they be grouped by categories, as they will appear in the catalog. This will enable you to monitor the development of the collection for each catalog.

The collection is arranged by accession number. The same beginning digit is assigned to books that are included in the same catalog. For instance, the accession number of titles in our first catalog began with 0, the second with 1, the third with 2, and so on. We also use special designations: B09.. for best sellers, J for Juvenile and Young Adult, S for Spanish, L for Large Print, and X for Oversize.

Paperbacks are re-enforced on the outside with book tape, and inside the front and back covers with transparent tape.

The annotations should be very short, mostly paraphrased from the publisher's catalog or the cover of the book. For the recommended structure of the annotations, please see the Self-Guided Tutorial of the Management System offered in Appendix B.

B. The Books by Mail Catalog

The catalog is primarily a selection tool for our subscribers. It offers approximately 1000 titles, all annotated. The catalog has the following components:

a. The cover displays the program logo, the date of the issue and the general contents. The back offers all the instructions regarding eligibility and use of the service. The instructions are in English and Spanish.

b. Order cards: two in English and two in Spanish.

c. Back cover: Inside lists other County Library services and facilities: map with branch locations and information about the Bookmobile. Outside is a mailer, with the non-profit stamp, return address, and a space for the mailing label.

d. Table of contents

e. Book collection divided in the following categories. Each category is identified with a small logo.

Best Sellers
General Fiction
Horror
Mystery
Suspense
Western
Fantasy and Science Fiction
Romance
General Non-Fiction
Cookery
Gardening
Humor
Biography
Parenting
Children's Books
Young Adult
Large Print
Spanish

At the end of the Romance and Young Adult sections, a note is added to indicate that series romances, such as Harlequin for adults and Sweet Valley High for young adults, although not annotated individually in the catalog, are available upon request.

Each title listing includes the catalog (accession) number, the author, title (in capital letters), and the annotation. For the computer printout instructions, please see the Self-Guided Tutorial of the Management System offered in Appendix B.

PRINTING THE CATALOG

An issue of the catalog is produced and mailed primarily to registered subscribers each October and April. Ten copies are given to each of the libraries in the Correctional Facility. In preparing to print the catalog, please remember the following:

1. The permanent masters (covers, instructions, title page, order cards) should be sent to the staff artist to update two months before the actual catalog is due at the print shop. As soon as the masters have been updated, they may be taken to the printers, with a printing requisition. At that time, you should also schedule the printing of the entire catalog.

2. In producing the computer printout, use a new printer ribbon. Use compressed print (high speed font, 16.7 pitch) in all categories except large print. Use courier font and 10 pitch for large print. Print each category separately.

3. Each title entry will have only four lines, and there will be one space between entries.

4. The computer print out is sent to the staff artist who will complete the layout. You don't need to begin each section at the top of a page. The use of a logo for each category sets it apart.

5. The camera-ready masters are sent to the print shop with the printing requisition. During the printing process, it is important to check on the progress. This is especially true when the completion date nears.

C. Service Delivery

The following section offers detailed information about the procedures followed specifically in the Monterey County Library. However, these steps may be adapted to fit the needs of any other library.

The Books by Mail office is equipped with shelves for the collection, a postage meter and scales, and a personal computer that is used to manage all activities. The use of the computer management system is described in the Self-Guided Tutorial, Appendix B.

Mailing supplies include reusable nylon bags, mailing tags, and the plastic strips that lock the tags in place. Detailed information about the actual mailing process is offered below.

1. Book Orders: Order cards are sent to subscribers with the catalog and in each book that is mailed to them.

BOOKS BY MAIL ORDER CARD Date _____

Name _____ Address _____

City _____ Zip _____ Phone (___) _____

Below, list CATALOG NUMBER and TITLE for each book you select.

NUMBER	TITLE	NUMBER	TITLE
1		4	
2		5	
3		6	

If any of the above selections is not available please circle:

SEND LATER *SEND SUBSTITUTE* *CANCEL*

Indicate below if you have an AUTHOR, TITLE, SUBJECT or REFERENCE request; please give as much information as possible. _____

_____

_____

_____

As the orders are received by mail or in returning book bags, they are counted and sorted. Orders from rural and inmate patrons are recorded separately.

There are three types of orders: requests from the Books by Mail catalogs, author and/or title requests (materials not appearing in the catalogs), and requests for information. The latter may be simple subject requests or complicated reference questions. When ordering specific titles, whether or not from the catalogs, the users indicate if they would accept a substitute.

Orders for titles from the BOOKS BY MAIL catalogs are searched first. The search is normally assigned to the page or the youth employment worker. If an item is not on the shelf, the number is circled in red, indicating to the Library Assistant that the title/titles need to be placed on reserve.

Orders that include author/title requests and/or information requests are handled by the Library Assistant and the Librarian II supervising the program.

o Author/Title Requests: Library Assistant will check the card catalog. If found, s/he will search the County Library shelves. If on the shelves, the LA will charge the book to BBM on the stock cards before mailing it to the patron. If not on the shelves, the LA will check the stock cards to determine which branches own it and then request it from one of them.

Searching the stock cards: The stock cards are an alphabetical listing by author (or title in the case of a title entry) of the holdings of the Monterey County Library System. These are separated in two files, Adult and Juvenile (including picture books, Easy, and Young Adult). Each card lists the owning library and the copy of the book at that site. In preparing the Author/ Title request form, list the owning sites on the right side of A/T form in a column. If a book is charged to a branch other than 149, 103, 14, 132, 22, 160, or 19, it is requested directly from that branch. The branch being contacted is circled and written in LIBRARY REPORT. Books held only by 149, 103, 14, 132, 22, 160, and/or 19 are handled by the interlibrary loan staff. When received, these books are placed on the Books by Mail shelf in Processing.

If a title is not found in the card catalog, and the patron does not want a substitute, the LA will then process it as an interlibrary loan. If a substitute is acceptable, the Librarian II will handle it as a subject request. If a title is on order, a County Library A/T request form is prepared and given to the acquisitions clerks.

o Processing Interlibrary Loans: Titles not owned by Monterey County Library are searched in BIP+ . If found, BIP is written on the right hand corner of the A/T form. Publisher and publication date are copied. CATALIST is also searched. CATALIST is a list of the holdings of California libraries pre-1985, in microfiche. The holdings are listed in two files: author/title and subject. Monterey County Library borrows from

certain systems and libraries. These are posted, with the abbreviations that appear in CATALIST, near the microfiche reader. By preference, libraries in CC (Central Coast) are chosen. The owning libraries are listed in the bottom center of the A/T form, and CAT is written next to BIP. If the title is not found, a 0 with a line through it, is written in the place of the owning libraries, and CAT is placed next to "BIP FB" in the right hand corner.

The forms are given to the Head of Administrative Services for her to assign a borrowing library or decide if the book should be purchased.

o Subject request/reference question: The Librarian II will decide whether she will handle it or refer it to the Reference Librarian in the Administrative Offices.

Books for rural patrons are grouped by family and placed on the Library Assistant's book truck on the BOOKS OUT side. Check-out procedures are explained in the Self-Guided Tutorial, Appendix B. Materials are placed in the reusable nylon bags and weighed. The mailing tag is addressed to the patron on one side, and stamped with the library's return address on the other. The mailing cost is determined by checking the current library rate chart. The postage meter is adjusted to read the appropriate amount, and the tag is run through the meter on both sides, therefore providing the patron with the return postage. Place the tag in the plastic pocket of the bag, with the patron's address showing, and secure the tag with a plastic tie. Please remember to include an order card and a plastic tie inside one of the books. It is safer to tape the tie to one of the date due slips.

When the books are returned, cut the plastic tie, and place the books on the BOOKS IN side of the book truck. to check them in, follow the instruction given in the Self-Guided Tutorial. Books borrowed from other libraries are returned to the interlibrary loan desk. County Library books are placed on the Books by Mail return shelves in Extension, to be discharged from the stock cards.

The books for Soledad inmates are picked-up once a week, normally on Fridays. Rubber band books by patron and box the books by facility --Central, North, South. Tape each box tightly and attach a large label with the name of the librarian and the facility to the box.

2. Postage Accounts and Special Mailings

a. Postage Meter: The postage machine used is a Hasler. Our postage meter account was set up by the sales-person. The number is registered with the Steinbeck Postal Sub-Station, which handles most of our mail, with the exception of the bulk-mailings and the business reply mail account, which are handled at the Main Post Office.

To refill the postage meter, we request a check from the Purchasing Department (made out to U. S. Postmaster) for the amount needed (we spent, based on 24 mailing days, between March and April, 1987, an average of $22.35 a day, for a total of $536.40 for the month). Since sometimes it takes several weeks for purchasing to issue the check, make sure that you request it when you have close to $1000.00 left in the meter. Only even amounts can be added to the account. The post office sets the new amount in the postage meter.

b. First Class Return: The return postage on the order cards in prepaid. In order to cover this charges, you need to set up a Business Reply Mail account (our number is #851). An application is filled out, and you pay a $50.00 annual permit fee, a $100.00 account deposit fee, and a $160.00 annual accounting fee (for over 1000 pieces) at the Main Post Office. The annual permit fee and the annual accounting fee are due each January. The post office will bill you. Money is deposited in a trust fund to cover the amount of the returns. At the beginning of the service, we deposited $1000.00 in the Trust Fund Account. From our first catalog in April, 1986 to April 21, 1987, the account was only charged $190.43. This is in part due to the fact that some patrons send in their order cards with the books returned, rather than individually by mail, which is legal within the regulations of the Library Rate.

c. Non-Profit Bulk-Mail: To apply for Bulk Mail, you will need to prove your status as a non-profit organi-zation, and pay a one time fee of $50.00, and an annual fee of $50.00, due January of each year. Our account number is #323. We also have a Trust Fund Account that must have enough money in it to cover the cost of the mailing being presented each time.

A bulk - mailing of flyers, carrier routed to both North and South County, totals $176.34, at the carrier rt. sort rate of $.055 per piece. A newsletter mailing to 414 families totalled $35.19, at the basic $.085 per piece. Mailing the October catalog cost $162.14. It included a carrier routed mailing to North County at .253 per lb., and to registered patrons in South County at .253 per lb., plus .016 per piece.

The BULK MAIL KIT is available from the local post office. Please remember the following guidelines:

-- Letters or Flyers: To bulk-mail, you must have a minimum of 200 pieces. Folded pieces must be at least .007 thick, weigh less than 16 oz., and be rectangular in shape, no less than 3 1/2" x 5". Staples must be tight, so that the mail carrier will not be injured. If they are not, the mailing may be discarded. Remember to have both the return address and non-profit imprint permit printed on your master copy. Otherwise you will have to hand stamp them on each flyer/letter.

Letters can be stacked to 4" in height and then rubber banded. If there are more than 125 letters to one 5 digit zip or carrier route, they must be bagged and labelled with the city and zip, or carrier rt, city, and zip. Letters must be sorted by 5 digit zip, 3 digit zip, or carrier route, depending on the number. Ten or more to the same zip code may be sorted together. Fewer than ten to a zip code must be sorted by 3 digit zip, and banded with other odd zips with the same 3 digit beginning. On each stack of letters, the red (5 digit) or green (3 digit) pressure sensitive labels must be put on the left-hand lower corner. A mailing list is prepared by carrier rt., towns, zips, and number being sent to each route or zip. It must also include the name of the mailing organization, address, phone, permit number, date, and total items in the mailing. A copy is made for our records.

To calculate the cost, the total number of pieces is multiplied by the rate per piece. The mailing is taken to Bulk Mail area of the Main Post Office where the weight is checked.

-- Flats: Flats are items such as the Books by Mail catalog. To send bulk rate, there must be at least 50 lbs. All flats must be bagged and labelled. The sorting process is the same as for letters, except they may be stacked higher. Goods numbers are between 12 and 16, depending on the thickness. They should be stacked 6-8 in one direction and 6-8 in the other---i.e. heads to tails for each group of 6 - 8. Also, they are weighed and go at a lb. rate for carrier routes. 5 digit and 3 digit go at a certain price per piece above the weight---5 digit .016 per piece, basic .03 per piece.

3. Overdues

a. Rural Overdues: The circulation period is three weeks, with all books due on Fridays. However, because of the uncertainty of the mail, we allow a two-week grace period.

On Monday afternoons, after all the returns have been checked in, the LA runs an overdue report for all the titles that have been out for more than six weeks. (Please see the Self-Guided Tutorial for instructions.) She then mails overdue notices to patrons who appear on the list for the first time, and bills to those who did not respond to the first notice.

The bills are the Monterey County Revenue Recovery forms that are used throughout the Monterey County Library system. When the bill is sent, we stop service to the patron until the overdue is cleared.

Copies of the bills (the blue and buff copies) are filed by date due and, then alphabetically by the patrons' last names. After 21 days, the blue form is given to the Administrative Services officer, to be forwarded to Revenue Recovery for collection.

b. CTF Soledad Overdues

Lists of overdue materials are sent to each facility librarian. Service is stopped to inmate patrons with overdues. Collection and returns are the responsibility of the facility librarians and their clerks.

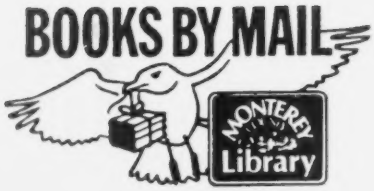
Each quarter, a bill is sent to the facility librarian for overdue and missing books. This is then paid by the librarian from the inmate's trust fund account, through the procedures established by CTF-Soledad.

DATE DUE

_____

Please save the shipping bag and label.

TO RETURN:
-Put reading materials in the reusable shipping bag.
-Reverse mailing label, and use extra plastic tie to attach to zipper.
-Place bag in mail.
THANK YOU!



Dear BOOKS BY MAIL Participant:

Our records show that materials checked-out to you by BOOKS BY MAIL are now overdue. We need to have them returned for use by other BOOKS BY MAIL participants.

Please return them as soon as possible. We will be unable to respond to your requests for other books until these items have been returned. Use the postage paid BOOKS BY MAIL bag to return them. We will appreciate your cooperation and look forward to continuing to serve you.

Sincerely,

_____
Librarian

BOOKS BY MAIL
Monterey County Library
26 Central Avenue
Salinnas, CA 93901

BOOKS BY MAIL
Monterey County Library
26 Central Ave.
Salinas, CA. 93901
(408)424-3244

V. OTHER ACTIVITIES: THE NEWSLETTER AND SPECIAL PROGRAMS

The bimonthly Books by Mail newsletter gives the staff the opportunity to communicate with all the subscribers. It is a forum to discuss problems, common questions, new books, and other matters. Each issue lists best sellers received from Baker and Taylor. Usually, we feature books on a subject appropriate to the season, e.g. tax books in January, holiday books in November, etc., or simply try to supplement sections of the catalog --additional large print titles, young adult notable books, etc.

The master copy of the newsletter is printed on the form designed for this purpose. The printing is done in-house on legal size paper. It is then folded, stapled, and labeled for bulk mailing.

VI. SUMMER READING, SCHOOL VISITS AND OTHER ACTIVITIES

Many of our young subscribers have no convenient access to a bookmobile, public or school library during the summer. Students of two schools are particularly isolated: San Antonio and Pacific Valley. We make sure that, before school ends, the students are reminded that they are eligible to participate in the Books by Mail program. Copies of the catalog are sent to the San Antonio School on the Bookmobile.

Whenever possible, the BBM staff visits the classrooms. The visits are arranged with the cooperation of the principals in May. In addition to discussing the BBM program, we also explain the activities of the summer reading program and distribute registration forms.

The Monterey County Library sponsors an annual summer reading program. All branches and the Bookmobile participate. The Books by Mail program adopts as many of the activities as can be handled by mail. We use the same theme and materials as the other libraries in Monterey County, but we adapt them for our use. For instance, a registration flyer is designed and mailed to our young participants.

Prizes such as stickers, buttons, certificates, etc. are mailed to those who reach the goal.

Books by Mail users are also encouraged to enter the County's annual bookmark contest. Entry forms and instructions are also provided by mail.

This Project Is Funded under the Auspices of the Library Services & Construction Act.

MYSTERY MANSION

1987
SUMMER
READING
PROGRAM

JUNE 15 through AUGUST 15

Books by Mail will be offering a Summer Reading Program by Mail for rural and homebound young residents of Monterey County. Children of all ages are welcome to participate.

To Register for Book by Mail's MYSTERY MANSION, please return this portion of the Form and receive the Program Packet.

NAME _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

PHONE _____ AGE _____ GRADE _____

Do you need any of the following catalogs? SPRING/SUMMER 1986 ☐
FALL/WINTER 1986 ☐ SPRING/SUMMER 1987 ☐

Mail this Form to:

BOOKS BY MAIL
Monterey County
LIBRARY,
26 Central Ave
SALINAS, CA
93901
(408) 424-3244

APPENDIX A

BOOKS BY MAIL SERVICE TO THE INMATES

OF THE

CORRECTIONAL TRAINING INSTITUTION

SOLEDAD, CALIFORNIA

CTF BOOKS BY MAIL REQUESTS: A MINI-MANUAL

In order to assure your patrons the very best service from BOOKS BY MAIL, we have some suggestions that may help in filling out the request cards that come to us. Please realize that the quickest response comes from items listed in the BOOKS BY MAIL CATALOG. Our fiction, suspense, science fiction, etc., selections represent the newest paperback titles in those popular areas. Also, the best sellers listed in our NEWSLETTER and latest catalog represent the most popular titles available for purchase each month.

In this mini-manual, we will go through the request card item by item:

BOOKS BY MAIL ORDER CARD

Log no: (3) 705
Date: (4) 6-1-87
Name: (1) John Smith
ID no: (5) D-----
Facility: (2) NORTH
Building: (6) RB---

(7) Circle if not available: (8) send later / (9) substitute / (10) cancel

(11) BBM CAT NO. TITLE

1. 80944 Windmills of the Gods
2. 2806 Song of Kali
3. 1980 Rock Guitar for Future Stars

(12) AUTHOR OR TITLE REQUEST:
Author: (13) Dennis, Patrick

Title: (14) Auntie Mame, — LC 54-11512, 1954, 11.95, 0-8149-0085-2, Vanguard

(15) Checked BBM CAT ✓ BIP (16) ✓ CATALIST (17) ___
Be sure name and title exact if found in BIP

FOR SUBJECT REQUESTS: see the back of the order form

1. NAME: Name of inmate patron: FIRST LAST.

2. FACILITY: CENTRAL, NORTH, or SOUTH.

3. LOG NO.: The number your facility library uses to keep track of your orders. For instance, NORTH uses a log book number as their control.

4. DATE: Date of patron request. The batch of orders received on each day are searched together. If two patrons request the same book, the earliest patron order date is honored.

5. I.D.: CTF identification number.

6. BUILDING: Building, dorm, room, and bed number. This is for your convenience when the book arrives.

7. CIRCLE IF NOT AVAILABLE: This helps us know what your patron would like us to do if his book is simply not available on the shelf at the time we receive the request.

8. SEND LATER: We put the book on reserve or request from another branch or library. Reserves are honored in the order they are received.

9. SUBSTITUTE: If your patron wants us to substitute another book, write: "OVER". In the SUBJECT REQUEST, write: "Substitute another book on parrots".

10. CANCEL: If the book isn't on the shelf of BOOKS BY MAIL or Monterey County Library Headquarters, send nothing.

11. BOOKS BY MAIL CATALOG: If the book is found in the BOOKS BY MAIL Catalog, we need both the NUMBER and the TITLE. This is to assure that your patron receives the specific book that he wants. Sometimes, patrons put the wrong number, but the correct title.

12. AUTHOR AND/OR TITLE REQUEST: Be complete! Give as much information as your patron knows. In fact, if he has a source: SUNSET April/1987 p40 give that as well. If your patron finds the title in BOOKS IN PRINT, check and make sure the entry is correct. We need author, title, publisher, date, price, LC number, and ISBN. All this information usually appears in the entry in BOOKS IN PRINT:

> **Sheldon, Sidney.** Windmills of the Gods. LC 86-23553. Feb. 1987. 18.95 (ISBN 0-688-06570-8). Morrow.

13. AUTHOR: Give the name of the author: LAST, FIRST MIDDLE.

14. TITLE: Be as exact as possible! If you write: MILL OF GOD for WINDMILLS OF THE GODS by Sidney Sheldon your chances of getting a request filled lessen significantly. You are relying on the guessing power of BOOKS BY MAIL. We're pretty good guessers, but not perfect. You know if your patrons are asking for a specific best seller at a given time! WINDMILLS OF THE GODS appears in our SPRING 1987 Catalog in the Best Sellers section as number B0944.

15. CHECKED BBM: This means you found the book in one of the BOOKS BY MAIL Catalogs. A serious attempt should be made to find each book in the BOOKS BY MAIL catalogs and recent best sellers in our newsletters. In library

jargon, this is called "searching" and is part of a library clerk's responsibility. You may want to keep the lists of best sellers from our newsletters near your work area. We some-times receive as many as 10 books in an order that appear in BOOKS BY MAIL catalogs. Again, we're good guessers, but not perfect. Your patrons get faster service if it is available from the catalogs. Even our reserves move faster than the county's in many cases.

16. CHECKED BIP: This means the source for your title was found in BOOKS IN PRINT.

17. CHECKED CATALIST: CATALIST is a record for the holdings of California libraries. However, it has not been updated since 1984. If you want a current title, it is best to do it as a SUBJECT REQUEST.

SUBJECT REQUEST: (18)
please give as much information a possible

Patron wants information on building wooden toys

18. SUBJECT REQUESTS: If you are interested in a topic, it is better to send it as a SUBJECT REQUEST. For instance, if you are interested in the subject of GYPSIES, it is a good idea not to use BOOKS IN PRINT. Monterey County Library orders new books all the time on many subjects. The title you request may be older, less complete, or not available locally. This means a much longer wait at your end. Remember, Inter-Library Loan has a cut-off price for ordering books. If your request does not meet this criterion, you will simply be told it is not available. An example might be a request for a book about GYPSIES. Your patron checks BOOKS IN PRINT and finds these titles: GYPSY ROSE LEE (a book about an American actress, who was NOT a gypsy), GYPSY IN AUTUMN (a woman's romance about a gypsy girl in the 18th century), GYPSIES AROUND THE WORLD (a travel book about a family that sails a schooner around the world). Whereas, books about GYPSIES might be entered under other titles: AN ALIEN PEOPLE IN MANY LANDS, EUROPE'S GYPSY MINORITY, HITLER'S PERSECUTION OF THE GYPSIES.

APPENDIX B

BOOKS BY MAIL PROGRAM MANAGEMENT SYSTEM

A SELF-GUIDED TUTORIAL

INTRODUCTION

The Books by Mail program of the Monterey County Library offers postage free library service to remote rural areas of the County, and to institutionalized and homebound persons. An annotated catalog is published twice a year and is mailed to over 1500 participants. Included are books in English and Spanish, for adults and children, and in large print for readers with low vision. Participants of all ages, however, are able to request the reading materials of their choice, even if they are not listed in the catalog.

Subscribers select books from the catalog or write the name of an author, title of a book, subject or reference question on the order cards supplied with the catalog. The postage on the cards is prepaid. The program staff mails the materials to them in nylon reusable bags. The return postage for every bag is pre-stamped on the return label; therefore, readers don't have to visit the post office to return the materials. All they have to do is place the books in the same bag, slip the return label in the pocket, and leave the bags in their mail box.

We began exploring this service alternative at the suggestion of South Coast rural residents, who were completed isolated in 1984 by a massive mudslide. As part of the research, we contacted staff other similar services and visited their sites. It became obvious that the management of such a service, especially with the volume of activity that we projected, would be cumbersome and time consuming if managed only with manual procedures.

Our library had no automated circulation system and very few members of our staff had, at the time, been exposed to the use of computers. We felt that, because of the nature of the Books by Mail program, i.e., a very specific target population, a separate collection, and as an experimental, pilot project, it could be easily developed as a self-contained library program, with its own procedures and management system. We decided then to develop Books by Mail as our first, fully-automated service and as one that would serve as a model for other relatively small, non-automated libraries, with limited resources.

We defined an affordable system as one that could be managed with a personal computer, and low-cost, off the shelve software. The software would need to be easy to use and teach, since it would be used by staff that had not been previously familiar with computer use.

MICROCOMPUTER USED

Compaq Deskpro (IBM compatible), 512 K, one disk drive, 30 MB hard disk, and a cassette back-up system for the hard disk.

SOFTWARE SELECTED

As mentioned previously, one of the objectives of the Books by Mail project was to demonstrate that a self-contained program in a non-automated library environment could be easily and inexpensively managed with the use of a microcomputer and commercially available software, even if the staff was not very experienced in the use of computers. In accomplishing this, we set out to identify integrated software that was inexpensive, and easy to learn and teach. Our choice was the PFS series.

The PFS series is not designed to be library specific, but it is rather all-purpose software. Although we were able to manage all aspects of the program, there were some limitations imposed by the nature of the software. These will be discussed as we describe our procedures in the pages that follow.

PROGRAMS USED

PFS PROFESSIONAL FILE - Data base manager
PFS PLAN - Spreadsheet
PFS PROFESSIONAL WRITE - Word Processing

a. A data base manager is a computer program that enables you to create, store, retrieve, search, update, and print files and records. To manage the operations of the Books by Mail Program, we developed three data bases: a patron registration file, a book collection file and an acquisitions record that merges with our budget spreadsheet.

b. A spreadsheet is an electronic financial ledger that can be used to record figures and make calculations. We use spreadsheets to control our budget and to keep our statistics.

c. A word processing program enables you to create, print, store, retrieve, and edit documents such as letters, reports, memos, etc. PFS Professional Write was used for our correspondence, newsletters, reports, etc. We will not include word processing in this tutorial, since it was not used it any way that was specific to our operation, but given all-purpose applications.

TUTORIALS

These tutorials were written for a microcomputer with two disk drives. If your computer has a hard disk, please make the necessary adjustments to the text. The tutorials are not meant to be a manual for all the applications of this software, but only for those that pertain to the management of the project. For additional information, consult your PFS manuals. The tutorials also assume that you are familiar with an IBM PC style keyboard.

TUTORIAL I

PATRON REGISTRATION FILE

This file was developed as a registration and an activity record for each of our users. The following information was included:

a. Registrant's identification number, name and address. In our program, two designations were used in creating the identification number: R- followed by three digits for rural patrons, and P- followed by the five digit Inmate Number assigned at the correctional facility for prison inmates.

b. Geographical region - To help us monitor the success of our regional outreach efforts and plan more effective strategies

c. Date registered and activity per year - Enables us to determine which patrons were not using the service. These patrons are called to find out if they are not satisfied and why. Patrons who move or decide not to participate are deleted form our records, therefore ensuring that our files are always up to date. This helps us have an accurate count of active participants at all times, and save postage when we do our mass mailings.

d. Overdue record - Alerts staff of delinquent patrons

e. Comments (special needs, interests, etc.) - Reminds staff of readers who only want large print books, or materials on a particular subject. May also be used to indicate if patron is a child. This is particularly helpful at times when special mailings about summer reading programs are being planned.

CREATING THE PATRON REGISTRATION FILE

1. With your computer turned off, but your monitor turned on, insert the disk operating system (DOS) program diskette in drive A.

2. Turn your computer on, and wait until the red light on the drive goes off. Press return __| at the date and time prompts.

3. When the A> appears, open drive A, remove the DOS diskette, insert the PFS Professional File (PFS PF) disk in drive A and a blank, formatted disk in drive B. Type PF and press return. Wait until the light goes off.

4. When the PF main menu appears on your screen, you will have the following choices:

1. Design
2. Add
3. Search/Update
4. Copy
5. Report
6. Setup

E. Exit

5. Select (and type) 1. The Design Menu then appears. Select 1, Create New Design. The Filename prompt will be displayed B:\ . Type PATRONS and press return.

6. At the blank screen, type the following field names. You must end each field name with a colon (:) to indicate where the field ends. (The fastest way to retrieve a form in PF is by searching for an exact match in the first field. Remember to make your first field one that will have data that is unique to each record).

ID #:

TITLE: FIRST NAME: LAST NAME:
ADDRESS:

CITY: STATE: ZIP:
REGION:
PHONE:
DATE REGISTERED:
ACTIVITY PER YEAR:
OVERDUE RECORD:
COMMENTS: (Special needs, interests, etc.)

7. When you are finished typing the field names, press F10 to save the design. PF then returns to the main menu.

8. You are now ready to begin adding information to your patron file. The program will create a form or record for each patron.

9. From the main menu, select 2 (Add). A copy of your design will appear. You will not be able to type over the field names. If you need to change field names or the format of your design, please consult your PFS PF manual. To move from one field to another, you may use the Tab key. In entering dates, make sure that you use the format yy/mm/dd, and that you always use two digits (e.g. 87/09/05).

10. The following is a sample of a complete form:

ID #: R-678

TITLE: Mr. FIRST NAME: John LAST NAME: Smith
ADDRESS: Route 1, Box 355

CITY: Lucia STATE: CA ZIP: 93985
REGION: South Coast
PHONE: 555-5666
DATE REGISTERED: 86/04/15
ACTIVITY PER YEAR: 35
OVERDUE RECORD: 0
COMMENTS: (Special needs, interests, etc.) Needs Large Print, prefers Westerns.

11. When you are finished entering the information for each form, press F10 to store the record in your Patrons file. Another blank copy of your design will follow.

12. The program offers some time saving features. To view these options, press F4 when you are adding information or updating a form. The pull down menu for Quick Entry will appear on your screen. Of these features, "Ditto Field" or Ctrl F is the most frequently used by our staff. It enables you to repeat information typed on the same field in the previous form. However, it can only be used when you are adding information, not while updating. Consult your PFS PF manual for further instructions.

13. To search, update, or change information on your records:

a. Go back to your main menu by pressing the Escape key.
b. Select 3 (Search/Update).
c. At the Search/Update menu, select 1 (Review/Edit records)
d. The search form (a blank copy of your original design) is then displayed. You may search and sort information by every field in your design, simply by moving the cursor to the field and typing the appropriate information. For instance:

(1) You need to update the "Activity per Year" field for a particular patron. At the search form, move your cursor to "ID #" and type patron's number, if available. Press F10. An exact match will be displayed immediately. If no ID # is available, move the cursor to "Last Name" and "First Name", and type the patron's name. Press F10. The program will then search through the data base until it finds the name. If it is not the right patron, but another patron with the same name, continue pressing F10 until the right patron is found. Move the cursor to the Activity per Year field, type the figure (type over the previous one, if needed), and press F10.

(2) If you want to view the names of patrons registered in a region, move your cursor to the "Region" field of the search form. Type the name of the region and press F10. The first name found will be displayed. Continue pressing F10 until the program informs you that no additional matches were found. At this point, the program will also tell you how many forms were actually found, giving you a total number of the patrons registered in that particular region.

14. PFS PF allows you to print complete or selected lists of your registered participants. For instance, you need an alphabetical list of patrons who registered but have never ordered, and their phone numbers. (Make sure that your printer in on, on line, and that there is sufficient paper).

a. Go to the main menu and select 5 (Report). At the report menu, select 2 (Print list).

b. The program will display the "Type report instructions" form. It is asking you for the order in which you would like the information to be printed. The information will appear in columns on the print out. Type 1 by the LAST NAME (program always sorts by the field marked as 1), type 2 by FIRST NAME, and 3 by the PHONE. Press F10

c. The program will now display the "Choose records to edit" form. Move to ACTIVITY PER YEAR and type /.. to find all blank entries.

Press F10.

d. At the List Options form, move down to "Header 1" and type INACTIVE PATRONS. Move to "Print field names (Y/N)" and type N, so that the words "last name", "address" etc., will not appear on the copy. Press return.

e. At the Printer Options, make the adjustments required by your printer and press return.

15. In the Books by Mail program, three lists pertaining to patron records are printed on a regular basis. One is the overdue list, which will be covered in the next tutorial, the others are an alphabetical listing of names, with addresses, and identification numbers, and a list, in numerical order by identification number, that also gives names and addresses. The use of these two lists will also be explained in the next tutorial.

A. To print the alphabetical list:

a. Go to the main menu and select 5 (Report). At the report menu, select 2 (Print list).

b. The program will display the "Type report instructions" form, asking you for the order in which you want the information to be printed. Type 1 by LAST NAME, type 2 by FIRST NAME, 3 by ADDRESS, 4 by CITY, and 5 by the ID #. Press F10

c. The program will now display the "Choose records to edit" form. Press F10 to print all records.

d. At the List Options form, move down to "Header 1" and type ACTIVE PATRONS - ALPHABETICAL LIST. Then move down to "Print field names (Y/N)". Type N. Adjust the "Page width" according to the type of printer and paper used. Press return.

e. At the Printer Options, make the adjustments required by your printer and press return.

B. To print the numerical list:

a. Go to the main menu and select 5 (Report). At the report menu, select 2 (Print list).

b. The program will display "Type report instructions". Type 1 by ID #, type 2 by LAST NAME, type 3 by FIRST NAME, 4 by ADDRESS, and 5 by CITY. Press F10

c. The program will now display the "Choose records to edit" form. Press F10 to print all records.

d. At the List Options form, move down to "Header 1" and type ACTIVE PATRONS - NUMERICAL LIST. Then move down to "Print field names (Y/N)". Type N. Move to "Page width" and adjust as needed. Press return.

e. At the Printer Options, adjust as needed and press return.

16. PFS PF allows you to delete information in two ways: by going through the "Delete" function of the Search/Update menu, or by using direct commands while you are searching and updating files.

A. Using Delete function:

a. At the Main Menu, select 3, Search/Update.

b. At the Search/Update menu, select 4, Delete records.

c. Program will then display the "Choose records to delete" form. Move to ID # and type patron's number. Press F10

d. You will be warned that the record will be removed permanently from the file. Press return to complete process.

B. Using direct commands:

a. At the Main Menu, select 3, Search/Update.

b. At the Search/Update menu, select 1, Review/Edit records.

c. Program will then display "Choose records to edit" .
Type the information necessary to retrieve the form (s) to be edited. Press F10. Once the right form appears on your screen, proceed as follows:

*To erase information from a specific field, move the cursor to that field and press Control (Ctrl) E.

*If your form has more than one page and you need to delete all the information from only one of the pages, press the Pg Up or Pg Dn keys until the right page is on the screen. Then press Ctrl P.

*To delete the entire record (all pages at once), press F3 to pull down the Form menu, and press 4. You will be warned that the entire record is about to be deleted permanently. Press return.

TUTORIAL II

BOOK COLLECTION FILE

The collection data base was designed to be an on order file, a tool to generate the program catalog, a reserves record, and a circulation system. The form has four pages: the first page is a bibliographic record, the second is a circulation form, and the third and fourth are used to enter reserves.

The form includes the following information:

FIRST PAGE:

CATALOG #: An accession number assigned by the staff. The books are shelved and patron requests are submitted using this number. It consists of four digits, beginning with the number that identifies the issue of the catalog in which the book appears. For instance, a book listed on the first catalog is numbered 0456, a book from the second catalog 1345, from the third catalog 2678, etc. Some catalog numbers, however, begin with a letter that identifies a special category; e.g. J0567 identifies a juvenile book listed in the first catalog, B3666 identifies a best seller listed in the fourth catalog, etc. L was used for large print, S for Spanish, and X for oversize.

COPY #:

AUTHOR: Last name first.

TITLE/BK: All in capital letters, so that it may be easily identified in the catalog.

PUBLISHER:

DATE: Copyright date.

PRICE:

SOURCE: Name of vendor.

ISBN #:

CATEGORY: Categories included in the catalog are: best sellers, general fiction, mystery, suspense, western, fantasy and science fiction, romance, non-fiction, cookery, gardening, humor, biography, parenting, children's books, young adult, large print, and Spanish.

INGRAM #: Most of our paperbacks are ordered from Ingram. Having their number available expedites reordering.

NF/SUBJECTS(S): Specific subjects covered in non-fiction books. This information is useful when filling subject requests.

ATUS (ON ORDER/DATE; REC'D/DATE): Date in which book was ordered and received.

ANNOTATION: A short summary of the contents. This information is included in the catalog to assist patrons with their selection.

TIMES CHECKED-OUT: Times a book has circulated. This information is used to weed materials and to refine the selection criteria.

SECOND PAGE: Circulation

CHECKED-OUT TO ID#: Patron's identification number.

DATE DUE: Books are always due on Friday. It is a four-week loan to allow for mailing time.

OVERDUE SENT (DATE): Sent two weeks after due date.

COMMENTS:

THIRD AND FOURTH PAGES: Reserves

R1: First reserve. Enter only patron's ID#.

TE: Date reserved.

COMMENT:

CREATING THE COLLECTION FILE FORM

1. At the PF main menu, select 1, Design. At the Design Menu, select 1, Create new Design. The Filename prompt will be displayed B:\. Remember to insert a formatted blank disk in drive B: Type BOOKS and press return.

2. At the blank screen, type the following field names. Remember to end each field name with a colon (:) to indicate where the field ends, and to try to make your first field one that will have data unique to each record.

CATALOG #: COPY #:

AUTHOR:
TITLE/BK:

PUBLISHER: DATE: PRICE:
SOURCE: ISBN #:
CATEGORY: INGRAM #:

F/SUBJECTS(S):

STATUS (ON ORDER/DATE; REC'D/DATE:

ANNOTATION:

TIMES CHECKED-OUT:

End of first page. Press Pg Dn. Type the following field names:

CHECKED-OUT TO ID#:

DATE DUE:

OVERDUE SENT (DATE):

COMMENTS:

End of second page. Press Pg Dn. Type the following field names:

RESERVES (ENTER PATRON'S ID#):

R1: DATE: COMMENT:

R2: DATE: COMMENT:

R3: DATE: COMMENT:

R4: DATE: COMMENT:

R5: DATE: COMMENT:

R6: DATE: COMMENT:

R7: DATE: COMMENT:

R8: DATE: COMMENT:

R9: DATE: COMMENT:

R10: DATE: COMMENT:

End of third page. Press Pg Dn. Page four will be for additional reserve records. Type rows as above, but labeled R11 to R20. When you complete your design, press F10.

3. To add information to your file, proceed as described previously in TUTORIAL I. The following is an example of a complete form:

CATALOG #: 2364 COPY #: 1

AUTHOR: Beard, James
TITLE/BK: JAMES BEARD'S MENUS FOR ENTERTAINING

PUBLISHER: Dell DATE: 1985 PRICE: 9.95
SOURCE: Ingram ISBN #: 0-441-44556-1
CATEGORY: Cookery INGRAM #: B-44556

NF/SUBJECTS(S): Entertaining, menus

STATUS (ON ORDER/DATE; REC'D/DATE): Rec'd 87/07/05

ANNOTATION: Entertain with ease, imagination and style.

TIMES CHECKED-OUT: 7

End of first page. Press Pg Dn.

CHECKED-OUT TO ID#: R-556

DATE DUE: 87/05/19

OVERDUE SENT (DATE): 87/06/23

COMMENTS: Book is in very bad condition. New copy has been ordered. Withdraw from the collection.

RESERVES (ENTER PATRON'S ID#):

R1: R-029 DATE: 87/05/26 COMMENT: Patron has o/d books.Check his record before mailing.

R2: P-23456 DATE: 87/06/12 COMMENT:

A word of caution when entering the annotations: if you plan to produce the master copy of your catalog in-house and need your printing costs to be low, we suggest not to make the annotations longer than two lines if the title is only one line long, or one line if the title has two lines. There should be approximately 35 characters (including spaces) per line.

As mentioned previously, the nature of the software imposes some limitations to the flexibility and simplicity of our operation. Two significant problems are, first, that we cannot merge or cross reference the collection file with the patron file, and, second, that time saving features, such as "Ditto field" (Ctrl F), are only available when your are adding records. Therefore, in order to have the complete information about the patron on the circulation and reserve pages of the form, you have to type the information each time. This means that if, for instance, a patron is checking out five books, the name and complete address have to be typed five times. Also, when checking out a reserved book, you need to erase the patron's name and complete address from the reserve page and retype it on the circulation page. We used this process during the first year of operation and found it terribly time consuming and tedious.

We decided to use patron identification numbers, instead. This requires us to have numerical and alphabetical lists of the registered patrons, so that we can easily find the information needed to address mailing labels and overdue postcards, but it has reduced considerably the time spent in handling the information.

TO CHECK OUT A BOOK

1. At the main menu, select 3 (Search/Update).

2. At the Search/Update menu, select 1 (Review/Edit records). The search form will be displayed. Type the catalog number and press F10. The correct title will appear on your screen within two seconds. If it is not the correct copy #, continue pressing F10 until it is displayed.

3. Press Pg Dn to the circulation page. Type patron's ID #, which should be on the order form, and the due date. Press F10.

4. Remember, you may search and sort information by every field in your design, simply by moving the cursor to the field, typing the appropriate information, and pressing F10. If you need to find a book record by the author, title, or any other field, you can do so. However, the process will take much longer than if you search by a number that is unique to the book and is in the first field of your design.

TO CHECK BOOKS IN

1. At the main menu, select 3 (Search/Update).

2. At the Search/Update menu, select 1 (Review/Edit records). The search form will be displayed. Type the catalog number and press F10. The correct title will appear on your screen. If it is not the correct copy #, continue pressing F10 until it is displayed.

3. Press Pg Dn to the circulation page. Press Ctrl P to erase patron information.

4. Press Pg Dn to the reserves page. If there are reserves, jot down patron ID #. Check your overdues list to ensure that patron is not delinquent. Press Pg Up to circulation page. Type Patron ID # and due date. Press F10.

PRINTING THE CATALOG

A catalog of approximately 900 titles is produced twice a year, and mailed to registered patrons as a selection tool. The printer used is a Toshiba P-321, set up for condensed or compressed print.

The program gives you the choice of printing one column, with all titles by the same author in alphabetical order, or two columns with a horizontal alphabetical sequence, rather than vertical. We felt that this would probably annoy our users. Therefore, we decided to print only one column and let the library graphic artist cut and paste to have two columns per page in the final layout.

1. Ensure that your printer is on, on line, and that there is sufficient paper.

2. At the main menu, select 5, Report. At the report menu, select 3, Print records or labels.

3. The "Type report instructions for records or labels" form will appear on the screen. Type + next to Catalog #:, SX next to Author, X next to Title, and X next to Annotation. Press F10. These instructions will give you a print out where the catalog # and author will be on the same line, and the title and annotation will each be on separate lines.

4. After pressing F10, the "Choose records to print" form will appear. Type 1 next to copy #. Move to "Category" and type one of the categories used in your catalog (e.g. Romance). Press F10.

5. At the "Records or labels options" form type:

   - N next to "Print field names"
   - If you are printing two columns, change "Number of records/labels across" to 2. If not, leave as 1.
   - Change "Page length" to 5. This will give you 4 lines of text plus one space per record. Press return.

6. "Printer options": Change "Pause between pages" to Y, if you want to control the number of forms that are printed on each page. This needs to be done manually, since there is no lines per page control in PFS PF. We limit the number of entries per page to ten. Adjust other printer options as required by your printer. Press return.

7. This process has to be repeated for each category. It is also followed in printing selected lists for special mailings and activities.

Our graphic artist has designed special symbols and headings for each category. You may generate your own by using clip art materials or software.

PRINTING THE OVERDUE LIST

The list of overdue materials is generated from the circulation page of the collection data base. You may print this list in condensed print. Please adjust your printer at this time.

1. At the main menu, select 5, Report. At the report menu, select 2, Print list.

2. The "Type report instructions for list" form will appear. Press Pg Dn to move to the circulation page. Type 3 by Catalog #, 4 by Copy #, 5 by Title, 1 by ID #, and 2 by Date Due. Press F10.

3. At the "Choose Records to Edit" form, press Pg Dn and move the cursor to Date Due. If you want a list of books that were due on particular date only, type the date in the following format: yy/mm/dd. However, if you want to print a comprehensive list of all overdue books, you will need to type a range of dates. For instance, if you began offering services on April 1, 1986 and your latest overdue date due is August 15, 1987, your date will be typed as follows:

   =86/04/01 -> 87/08/15.

   | Dash and "greater than" symbol.

Press F10.

4. At the "List options" form, move to Header 1 and type Overdues as of yy/mm/dd. Move to Page width and type 135 (if printing condensed print). Press return.

5. At the Printer Options form, adjust to fit the requirements of your printer and press return.

TUTORIAL III ACQUISITIONS DATA BASE

The acquisitions data base was developed to help us keep track of our purchases on an order by order basis. It was designed to merge with the spreadsheet used to monitor our budget and to produce our expenditure reports. Since formulas are included in the design, all mathematical calculations are automatically done by the program.

Not all the fields contain information that will appear on the spreadsheet, since the spreadsheet will have mostly calculations from the acquisitions data base. The data entered in fields that contain budget item names, months or quarters needs to be spelled identically to the way it appears on rows or columns of the spreadsheet. Examples of this will be given in the pages that follow.

The following fields are used:

EXPENSE CATEGORY: Account against which the purchase will be charged, e.g. library materials, office supplies, etc. In the case of salaries, if you want only totals for all salaries to appear on the spreadsheet, the word "salaries" will suffice. However, if you want running totals for individual job titles, and you have listed them on the spreadsheet, enter the job title in this space. In our program, we list Lib. I for the coordinator, and LA II for the project assistant.

ENCUMBRANCE: Amount encumbered for the order being recorded.

DATE ORDERED:

VENDOR:

ORDER #: Purchase order number.

ENCUMBRANCE QTR: For reporting purposes, we need to keep track of the expenditures and encumbrances per project quarter. As listed on the spreadsheet, this information is posted as Encumb.Qtr4, for instance, to indicate that the money was encumbered during the fourth quarter.

OF ITEMS ORDERED: We have found this field and the following especially helpful in keeping track of book orders, and when cancelling back ordered titles at the end of the fiscal year.

OF ITEMS REC'D: Number of items received.

MONTH 1: (There are similar entires for month 2, and 3 within a quarter). Month in which the payments are issued. The month needs to be spelled exactly as on the spreadsheet to merge monthly expenditures.

INVOICE 1: Type number of the first invoice received for the order. There are similar entries for up to three invoices per month per order. They appear as INVOICE 2 and INVOICE 3 in the design.

AMOUNT 1: Amount charged in invoice 1, above. There are similar entries for amounts 2 and 3 after the invoices. Do not use a dollar sign.

MONTH 1 TOT: Total paid during month 1. Sum of three invoices. There are similar entries for months 2 and 3. A formula has been built into this field. Therefore, the total figure is not typed, but calculated automatically by the program. Formulas will be explained later in this document.

AMOUNT PAID: Also controlled by a formula. It is the sum of the amounts paid during months 1, 2, and 3.

AMOUNT ENCUMBERED: Also controlled by a formula. The program automatically subtracts the amount paid from the encumbrance.

CREATING THE ACQUISITIONS DATA BASE

1. At the PF main menu, select 1, Design. At the Design Menu, select 1, Create new Design. The Filename prompt will be displayed B:\ . Remember to insert a formatted blank disk in drive B. Type ACQFILE and press return.

2. At the blank screen, type the following field names. Remember to end each field name with a colon (:) to indicate where the field ends. Since some of the fields will have formulas, be sure to leave sufficient room at the end of the field to fit fifteen characters and spaces.

EXPENSE CATEGORY:

ENCUMBRANCE:

DATE ORDERED:
VENDOR:
ORDER #:
ENCUMBRANCE QTR:
OF ITEMS ORDERED:
OF ITEMS REC'D:

MONTH 1:
INVOICE 1:
AMOUNT (1):
INVOICE 2:
AMOUNT (2):
INVOICE 3:
AMOUNT (3):
MONTH1TOT:

AMOUNT ENCUM:

AMOUNT PAID:

MONTH 2:
INVOICE 1:
AMOUNT (1):
INVOICE 2:
AMOUNT (2):
INVOICE 3:
AMOUNT (3):
MONTH2TOT:

MONTH 3:
INVOICE 1:
AMOUNT (1):
INVOICE 2:
AMOUNT (2):
INVOICE 3:
AMOUNT (3):
MONTH3TOT:

ENTERING FORMULAS

As was mentioned previously, entering formulas in your design will enable the program to do all calculations for you. To enter formulas:

1. Go to the main menu of PFS:Professional File. Select #1, Design. At the Design menu, select Enter/Edit formulas. When your ACQFILE design is displayed, enter formulas, as follows:

EXPENSE CATEGORY:

ENCUMBRANCE: #21

AMOUNT ENCUM: #23 = #21 - #22

AMOUNT PAID: #22 = #4+#8+#12

DATE ORDERED:
VENDOR:
ORDER #:
ENCUMBRANCE QTR:
OF ITEMS ORDERED:
OF ITEMS REC'D:

MONTH 1:
INVOICE 1: #1
AMOUNT (1):
INVOICE 2: #2
AMOUNT (2):
INVOICE 3: #3
AMOUNT (3):
MONTH1TOT: #4=#1+#2+#3

MONTH 2:
INVOICE 1:
AMOUNT (1): #5
INVOICE 2:
AMOUNT (2): #6
INVOICE 3:
AMOUNT (3): #7
MONTH2TOT: #8=#5+#6+#7

MONTH 3:
INVOICE 1:
AMOUNT (1): #9
INVOICE 2:
AMOUNT (2): #10
INVOICE 3:
AMOUNT (3): #11
MONTH3TOT: #12=#9+#10+#11

Press F10.

ADDING INFORMATION:

1. At the PFS:PF main menu, select 2, Add. Use the tab key to move from one field to the other. To make the searching and merging possible, you need to make sure that each month is always placed in the same column. That is, if your fiscal year runs from July to June, you should place the months in the data base as follows (remember to spell them as they will appear on the spreadsheet):

Month 1: Jul	Month 1: Oct	Month 1: Jan	Month 1: Apr
Month 2: Aug	Month 2: Nov	Month 2: Feb	Month 2: May
Month 3: Sep	Month 3: Dec	Month 3: Mar	Month 3: Jun

By following this format, you will be certain of where to place the name of the month you are merging or searching for, when you fill out the Choose Records to Edit form, and you will only have to search once.

Once your figures have been entered, press Ctrl C to calculate the page. The following is a sample of a complete form:

EXPENSE CATEGORY: LIBRARY MATERIALS AMOUNT ENCUM: 164.10

AMOUNT PAID: 135.90

ENCUMBRANCE: 300.00

DATE ORDERED: 87/07/15
VENDOR: INGRAM
ORDER #: 87-33
ENCUMBRANCE QTR: ENCUMB.QTR4
OF ITEMS ORDERED: 55
OF ITEMS REC'D: 30

MONTH 1: JUL
INVOICE 1: P334455
AMOUNT (1): 55.60
INVOICE 2:
AMOUNT (2):
INVOICE 3:
AMOUNT (3):
MONTH1TOT: 55.60

MONTH 2: AUG
INVOICE 1: P67889
AMOUNT (1): 25.00
INVOICE 2: P76888
AMOUNT (2): 40.00
INVOICE 3:
AMOUNT (3):
MONTH2TOT: 65.00

MONTH 3: SEP
INVOICE 1: P87666
AMOUNT (1): 15.30
INVOICE 2:
AMOUNT (2):
INVOICE 3:
AMOUNT (3):
MONTH3TOT: 15.30

To remove, change, search, or print information, proceed as indicated in the previous tutorials.

TUTORIAL IV: THE SPREADSHEET

The spreadsheet is a computer program that enables you to organize numerical data and perform mathematical calculations. We use PFS:PLAN to monitor our budget, keep statistics, and prepare expenditure and statistical reports. To post budget figures, we merge our PFS:PLAN worksheet with the acquisitions data base discussed in Tutorial III. The merging process will be described on Part A, #12 of this tutorial.

PART A: THE BUDGET

1. To set-up the Books by Mail budget spreadsheet, load DOS, place the PFS:PLAN disk in Drive A, and type Plan at the A>.

2. At the main menu, select 1, Design/Edit, and press return. A blank spreadsheet will be displayed. You will use rows to list your budget item headings, and columns for the months and quarters, and to list the budget and the balance. Use the tab key to move between columns. Be aware that you will be able to move faster by using the "End" key followed by an arrow key.

3. Begin by typing the rows. Spacing is of great importance, since it determines which entries are grouped together for calculations, and it facilitates the use of keywords and formulas. To group your rows, indent the members of the group under the group heading.

4. Move the cursor to the area labeled as "Headings" (column on the left). Type the following:

```
SALARIES AND BENEFITS
 Salaries
   Lib. I
   LA II
 Sub-total Salaries

 Benefits

TOTAL SALARIES AND BENEFITS

LIBRARY MATERIALS

OPERATING EXPENSES
 Office supplies
 Microcomputer supplies
 Library supplies
 Postage
 Mileage
 Printing

TOTAL OPERATING EXPENSES

EQUIPMENT

GRAND TOTAL
```

5. Move your cursor to the first column heading area. The column headings will also need to the grouped, so that you may have totals by quarter. Begin by typing the months, using three-word (Jan, Feb) abbreviations. Do not use periods. Type the following headings, one per column:

Oct Nov Dec Total Qtr1 Encumb.Qtr1

Jan Feb Mar Total Qtr2 Encumb.Qtr2

Apr May Jun Total Qtr3 Encumb.Qtr3

Jul Aug Sep Total Qtr4 Encumb.Qtr4

FY TOTAL BUDGET BALANCE

You should have twenty-three columns.

6. To set-up column groups, insert two additional rows in the columns headings area, as follows. Place the cursor on Oct. Press F6. "Insert Row/Col" will be displayed on the bottom of your screen. Type R, for row. Repeat these steps once more.

7. To group quarters, move your cursor to the space above Oct and type -Qtr1----- until the dashes reach the column labeled Dec. Press the Tab key. Repeat these steps for every group of three months, labeling them Qtr2, Qtr3, and Qtr4. Do not include encumbrance columns in these groupings.

8. You also need to create a group that will enable you to calculate year-to-date totals (including quarters and encumbrances) and a balance. To do so, move your cursor to the beginning of the top row in the column headings area. Type -Expenses---- and extend the dashes until (and including) the column labeled Encumb.Qtr4. Do not include columns FY TOTAL, BUDGET, OR BALANCE.

9. FORMULAS AND KEYWORDS: The formulas and keywords make automatic calculations possible. To enter formulas, press F9.

A. Formulas for row groups: Move the cursor into the formula region to the left of the row headings. Type keyword and formulas as follows, making sure that the cursor is on the same row as the heading that corresponds to the formula.

Keyword/formula	Row Heading
@Total salaries	Total Salaries
@Total salaries and benefits	Total Salaries and Benefits
@Total operating expenses	Total Operating Expenses
@Total	Grand Total

B. Formulas for column groups: To create the keywords/formulas for the column groups, move the cursor into the formula region above the column headings and type the following:

Keyword/Formula	Column Heading
@Total Qtr1	Total Qtr 1
@Total Qtr2	Total Qtr 2
@Total Qtr3	Total Qtr 3
@Total Qtr4	Total Qtr 4
@Total Expenses	FY TOTAL
Budget - @Total Expenses	BALANCE

10. Move the cursor to the are labeled "Recalculate Automatically Y/N" and change to N. This will enable you to recalculate the entire spreadsheet only when you want to and not every time you enter a figure, which can be terribly time consuming. To recalculate, press F7.

11. Most figures are posted while merging the spreadsheet with the acquisitions data base. The only figures that you will have to post are the budget figures. Please do so now.

12. To merge the spreadsheet with the data base:

a. From the spreadsheet, return to the main menu of PFS:PLAN. Select 2, Get, and press return. At the Get Menu, select 3, Get PFS:FILE data, press the tab key to move the cursor to Directory or file name. Type ACQFILE and press return.

b. The Retrieve Spec form will appear, showing the design of the data base. Move to MONTH 1: and type OCT. Press return.

c. The Plan Spec form will appear. Move to EXPENSE CATEGORY and type R, to MONTH 1: and type C, and to MONTH1TOT: and type V. (This means that EXPENSE CATEGORY will supply the row heading on the spreadsheet, MONTH 1: the column, and MONTH1TOT: the value). Press return. While merging, the program also recalculates the spreadsheet, giving you year-to-date totals and the balance. Repeat these steps for each month.

d. To merge the encumbrances for the first quarter, move to ENCUMBRANCE QTR: at the Retrieve Spec form, and type Encumb.Qtr1. Press return. At the Plan Spec, move to EXPENSE CATEGORY and type R, to ENCUMBRANCE QTR: and type C, and to AMOUNT ENCUMB: and type V. Press return.

e. It is possible to merge only the expenses or encumbrances charged to one budget item (e.g. Library Materials) during a particular month. To do so, include the expense category, as well as the month or encumbrance quarter on the Retrieve Spec.

* A word of caution: if the column that will receive the information already has figures posted, the program will add the new figures to the existing ones. This means that you will be posting the same figure twice. To avoid this, make sure that there are no values in the column before you merge.

13. **VIEWS:**

At times, you may want to work with one portion of the worksheet only. For instance, you may want to have the columns corresponding to the first quarter, the year-to-date totals, and the balance displayed on the screen. Or you may only need to print a portion of your worksheet for a report. In order to do this, you must create a view. You can create up to four views for each of your worksheets.

To create a view, start with your worksheet on the screen.

a. Press F8. A message will appear at the bottom of your screen asking you whether you want to define, show or remove a view: (D/S/R). Select D (define).

b. Plan will then display regions that you will use to name the view and to indicate which columns you would like to include in it. After naming the view, move your cursor to the regions to the left of the rows and above the columns. To indicate rows and columns to include, type a plus sign (+) above each column and to the left of each row. To indicate rows and columns not to be included, type a minus sign (-) in those spaces. After selecting the rows, press F8. The view regions then disappear from the screen.

c. To see a view, press F8. Select S (show). Plan will then ask you which view to show. Type the name of the view and press F10. The selected view will appear on the screen. While the view is displayed, you can enter new values or change existing ones. The changes will be entered in the worksheet. To make these changes permanent, however, you will need to save your worksheet again. To return to the entire worksheet, press F8.

14. To **PRINT** the spreadsheet:

a. At the Main Menu, select 5, Print, and press return.

b. At the Print Options Menu, move the cursor using the Tab key, and adjust the options as needed. You will especially need to adjust the page width if you want to print the entire worksheet. Press return.

c. You will be asked to position the paper in your printer. After doing so, press return.

15. To **SAVE** the worksheet:

a. At the Main Menu, select 3, Save, and press return.

b. At the Save Menu, select 1, Save worksheet. Using your tab key, move to Directory or file name and type Spread (or any other appropriate name), and press return.

16. To **REMOVE** the worksheet:

a. At the Main Menu, select 4, Remove. Press return.
b. You will then be asked for the name of the file to remove. After typing it, press return.
c. You will be warned that you are about to remove the file. If you wish to proceed, press return. If not, press the escape key.

PART B: STATISTICAL REPORT

A spreadsheet is used to keep Books by Mail activity records. The spreadsheet is designed to calculate separate statistics for rural patrons and prison inmates; as well as circulation of Books by Mail catalog titles and materials drawn from the County Library general collection. All figures, however, are compiled in an overall total for each quarter and a final grand total.

1. To set-up the Books by Mail statistics spreadsheet, load DOS, place the PFS:PLAN disk in Drive A, and type plan at the A>.

2. At the main menu, select 1, Design/Edit, and press return. A blank spreadsheet will be displayed. You will use rows to list the types of materials circulated, and columns for the months, quarters, and the grand totals. Remember to use the tab key to move between columns and that you will be able to move faster by using the "End" key followed by an arrow key.

3. Begin by typing the rows. Remember also that spacing is of great importance, since it determines which entries are grouped together for calculations, and it facilitates the use of keywords and formulas. To group your rows, indent the members of the group under the group heading.

4. Move the cursor to the area labeled as "Headings" (column on the left). Type the following:

CIRCULATION

BOOKS BY MAIL CATALOG

Best Sellers
Gen. Fiction
Mystery
Suspense
Western
Fantasy/Sci Fi
Romance
Non-Fiction
Cookery
Gardening
Humor
Biography
Parenting
Children
YA
LP
Spanish

Sub-total Books by Mail

COUNTY

Magazines
Photocopies
Books
Best Sellers
Gen. Fiction
Mysteries
Westerns
Sci Fi
Non-Fiction
LP
Spanish
Children
YA
Sub-total County books

Sub-total County

TOTAL CIRCULATION

A/T REQUESTS

INFO/REF

5. Move your cursor to the first column heading area. The column headings will also need to the grouped, so that you may have two columns per month, one for rural patrons and one for inmates, quarter totals for each group, totals for both by quarter, year-end totals for each, and global totals. To set-up columns groups, insert two additional rows in the columns headings area, as follows. Place the cursor on the first column heading region and Press F6. "Insert Row/Col" will be displayed on the bottom of your screen. Type R, for row. Repeat these steps once more. Proceed to type the following headings, one per column:

RURAL1 CTF1

Move your cursor to the space above RURAL1 and type -OCT-- Continue to extend the dashes until they reach the end of CTF1. This allows you to enter statistics for rural and CTF patrons, in the month of October, which is part of the first quarter.

Type the following in the next two columns:

RURAL1 CTF1

Move your cursor to the space above RURAL1 and type -NOV-- Continue to extend the dashes until they reach the end of CTF1.

RURAL1 CTF1

Move your cursor to the space above RURAL1 and type -DEC-- Continue to extend the dashes until they reach the end of CTF1.

*CTF: Correctional Training Facility, Soledad

Move your cursor to the space above RURAL1 in October. Type -QTR1--
Continue to extend the dashes until they reach CTF1 in December.
With the use of a formula, this set-up will give you quarter totals.

Move your cursor to the headings region of the column to the right of CTF1 in December. Type TOTAL RURAL1. On the same region of the next two columns type: TOTAL CTF1 TOTAL QTR1. You now have the complete set-up for the first quarter of the fiscal year. You should have nine columns, and there will be nine columns per quarter.

The set-up for the second quarter will be as follows:

```
---------------------------QTR2-----------------------------------------
-----JAN---- -----FEB---- -----MAR---|             |           |
RURAL2|CTF2| RURAL2|CTF2| RURAL2|CTF2|TOTAL RURAL2|TOTAL CTF2|TOTAL QTR2
      |    |       |    |       |    |            |          |
      |    |       |    |       |    |            |    .     |
```

Following the same steps, please proceed to complete the third and fourth quarters. After the fourth quarter's totals column, add three columns for the year's totals, as follows.

a. Move the cursor to the headings region and type:

YEAR/TOTAL RURAL YEAR/TOTAL CTF GRAND TOTAL

b. Move cursor to the space above YEAR/TOTAL RURAL, and type --GTOTALS--- Continue to extend the dashes until they reach the end of YEAR/TOTAL CTF.

The same type of set-up can be used in keeping separate statistics for adult and juvenile populations, for separate branches within a system, etc. Just label your columns and group your headings according to your needs.

5. **FORMULAS AND KEYWORDS:** To enter formulas, press F9.

A. Formulas for row groups: Move the cursor into the formula region to the left of the row headings. Type keyword and formulas as follows, making sure that the cursor is on the same row as the heading that corresponds to the formula.

Keyword/formula	Row Heading
	CIRCULATION
	BOOKS BY MAIL CATALOG
	Best Sellers
	Gen. Fiction
	Mystery
	Suspense
	Western
	Fantasy/Sci Fi
	Romance
	Non-Fiction
	Cookery
	Gardening
	Humor
	Biography
	Parenting
	Children
	YA
	LP
	Spanish
@Total Books by Mail	Sub-total Books by Mail
	COUNTY
	Magazines
	Photocopies
	Books
	Best Sellers
	Gen. Fiction
	Mysteries
	Westerns
	Sci Fi
	Non-Fiction
	LP
	Spanish
	Children
	YA
@Total books	Sub-total County books
@Total County	Sub-total County
@Total Circulation	TOTAL CIRCULATION
	A/T REQUESTS
	INFO/REF

B. Formulas for column groups: To create the keywords/formulas for the column groups, move the cursor into the formula region above the column headings and type the following:

Keyword/Formula	Column Heading
@Total Rural1	TOTAL RURAL1
@Total CTF1	TOTAL CTF1
@Total QTR1	TOTAL QTR1
@Total Rural2	TOTAL RURAL2
@Total CTF2	TOTAL CTF2
@Total QTR2	TOTAL QTR2
@Total Rural3	TOTAL RURAL3
@Total CTF3	TOTAL CTF3
@Total QTR3	TOTAL QTR3
@Total Rural4	TOTAL RURAL4
@Total CTF4	TOTAL CTF4
@Total QTR4	TOTAL QTR4
Total Rural1+Total Rural2+ Total Rural3+Total Rural4	YEAR/TOTAL RURAL
Total CTF1+Total CTF2+ Total CTF3+Total CTF4	YEAR/TOTAL CTF
@Total GTotals	GTOTALS

6. Move the cursor to the are labeled "Recalculate Automatically Y/N" and change to N. You may now proceed to post your figures. To recalculate, press F7.

7. To create views, print the statistics, save or remove the spreadsheet, please see TUTORIAL IV, Part A.